

What do users want?

Data from the “last greenfield market,” Myanmar

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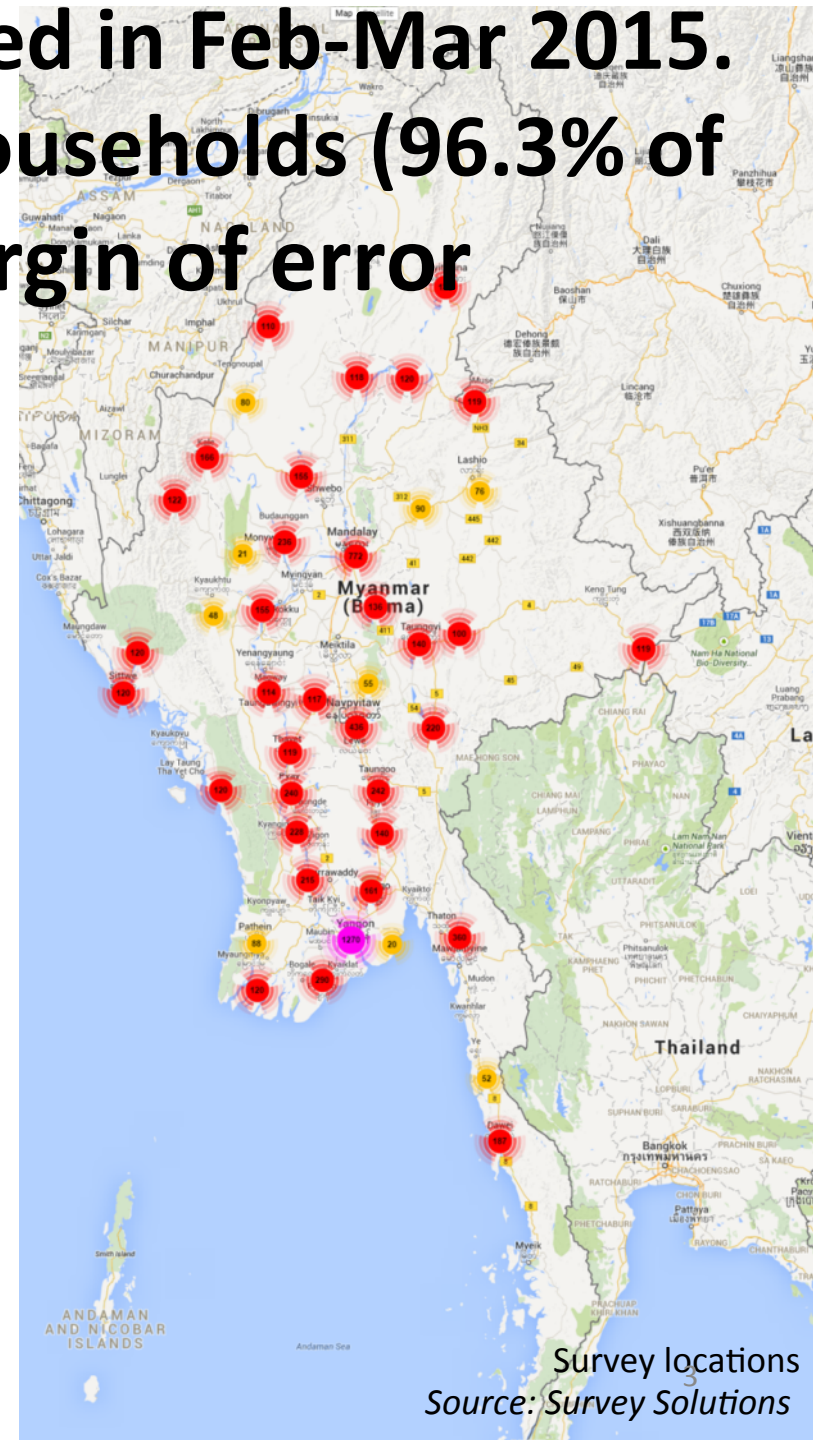
Nationally representative survey on ICT needs and use in Myanmar (baseline, in anticipation of at least one more survey)

- To establish a national baseline
 - Where Myanmar stands now
 - Measure impacts of mobile in 1 year (subject to funding)
- Focus on mobile and Internet (where in use)
- Data collected in Feb-Mar 2015 by CAPI from
 - 8,400 households
 - household level questionnaire (from household head)
 - individual level questionnaire (one individual, randomly selected, aged 15-65)
 - 500+ 'clusters' (urban=wards; rural=villages)
 - Cluster characteristics
 - Mobile network quality (using software on a mobile phone)
 - Retail prices of 20 household essentials (rice, gram, coconuts, etc.)

Nationwide survey conducted in Feb-Mar 2015.

Representative of 97% of households (96.3% of population) with $\pm 2.5\%$ margin of error

- Representative of population aged 15-65 in all accessible areas of Myanmar
 - 32 townships excluded due to security concerns
 - 97% of total households and 96.3% of total population represented with $\pm 2.5\%$ margin of error
- Stratified four stage PPS cluster sampling design used; stratification by:
 - 1) Population size (big cities; other major cities; smaller townships)
 - 2) Geographic region (Delta, Eastern hills, Long coast, etc.)
 - 3) Urban/rural
- For full sampling details, see Methodology Note



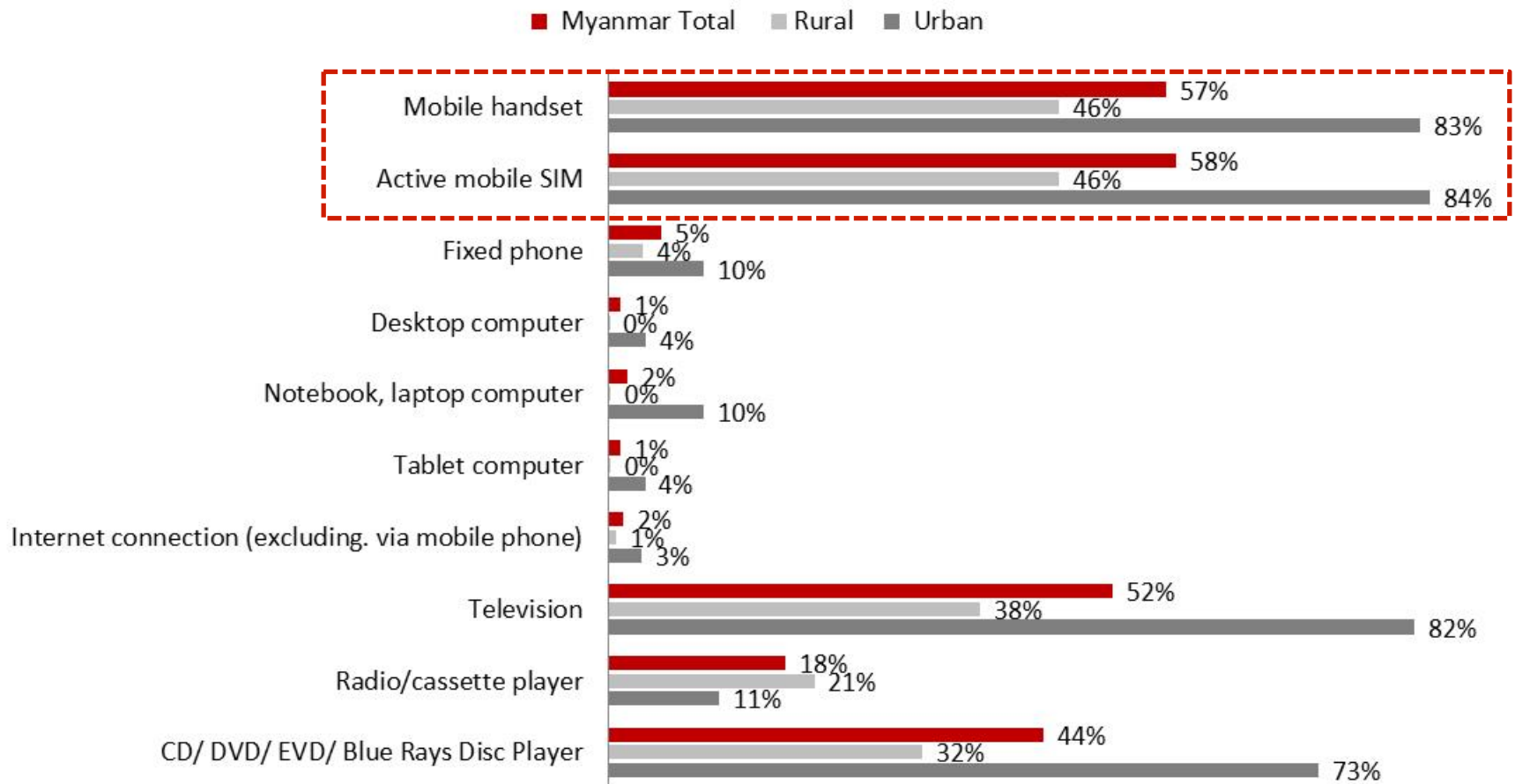
Survey locations
Source: Survey Solutions

More than 90% of wards/villages reached by wireless signal & have reload locations. Purchase of SIM & handset still limited to urban areas.

		Wards (urban)	Villages (rural)	All Myanmar
Do you receive any mobile phone coverage in your ward/village?	Yes	96%	87%	90%
	No	3%	9%	7%
	Don't know	1%	4%	3%
Can you top-up your mobile phone credit in this ward/village?	Yes	96%	60%	72%
	No	4%	39%	28%
	Don't know	0%	1%	1%
Can you purchase a mobile SIM card in this ward/village?	Yes	84%	22%	42%
	No	17%	77%	57%
	Don't know	0%	1%	1%
Can you purchase a mobile phone handset in this ward/village?	Yes	82%	13%	35%
	No	18%	86%	64%
	Don't know	0%	1%	1%

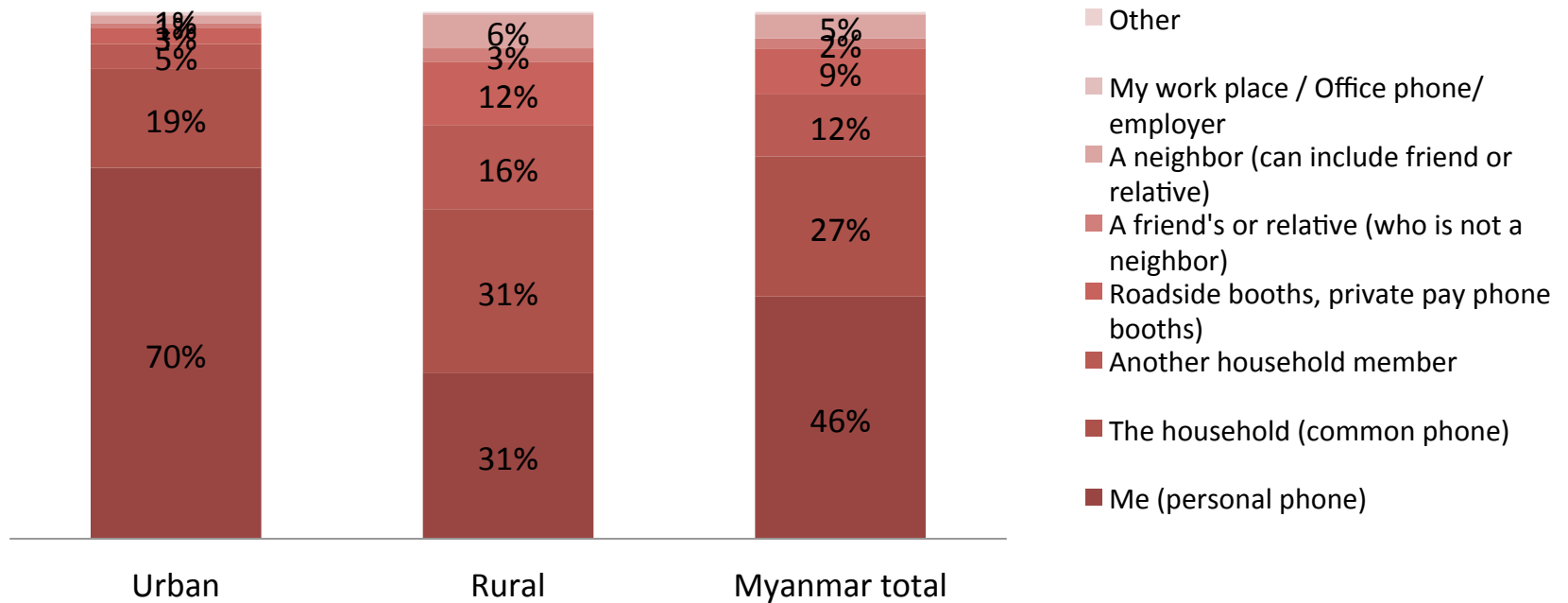
~ 60% of households have *at least* 1 mobile phone and active SIM among members (half of these households have *more than* 1).

Access to ICTs and ICT services in the household (% of Myanmar households)



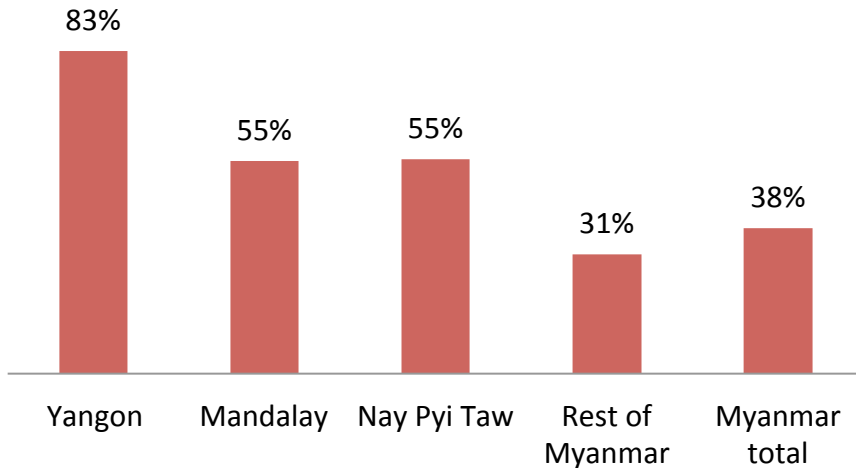
Most either used their own phone or another one in the house. 78% of rural teleusers can get to a phone in the house

Whose phone did you use last? (% of 15-65 year olds who have used a phone before)

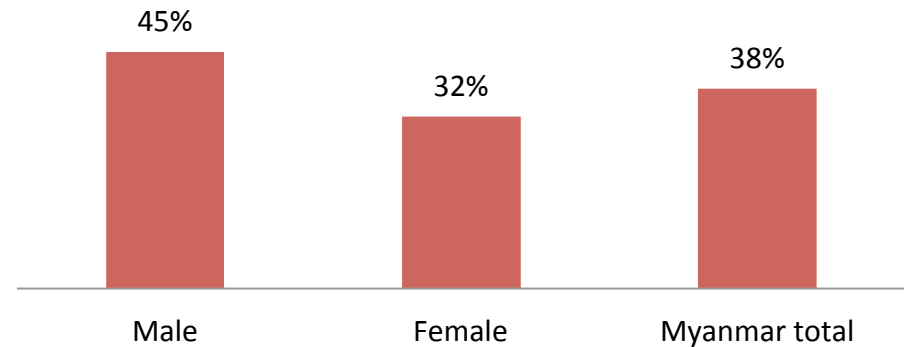


Adoption driven by big cities; Gender gap exists; No 'obvious' ageism

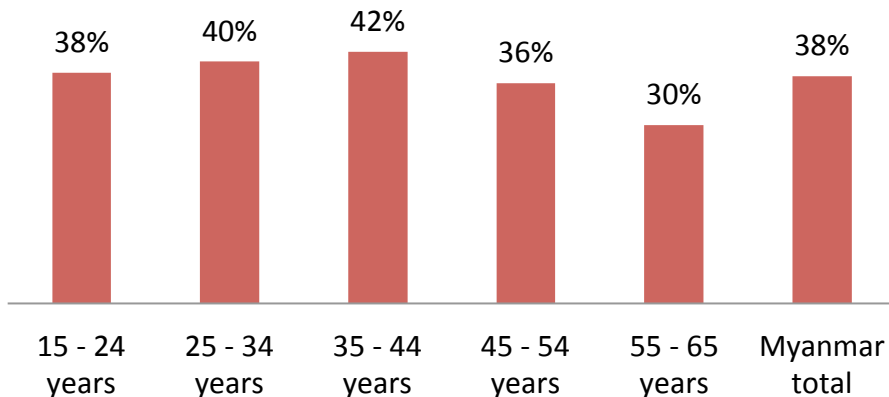
Mobile subscribers (% of 15-65 year olds)



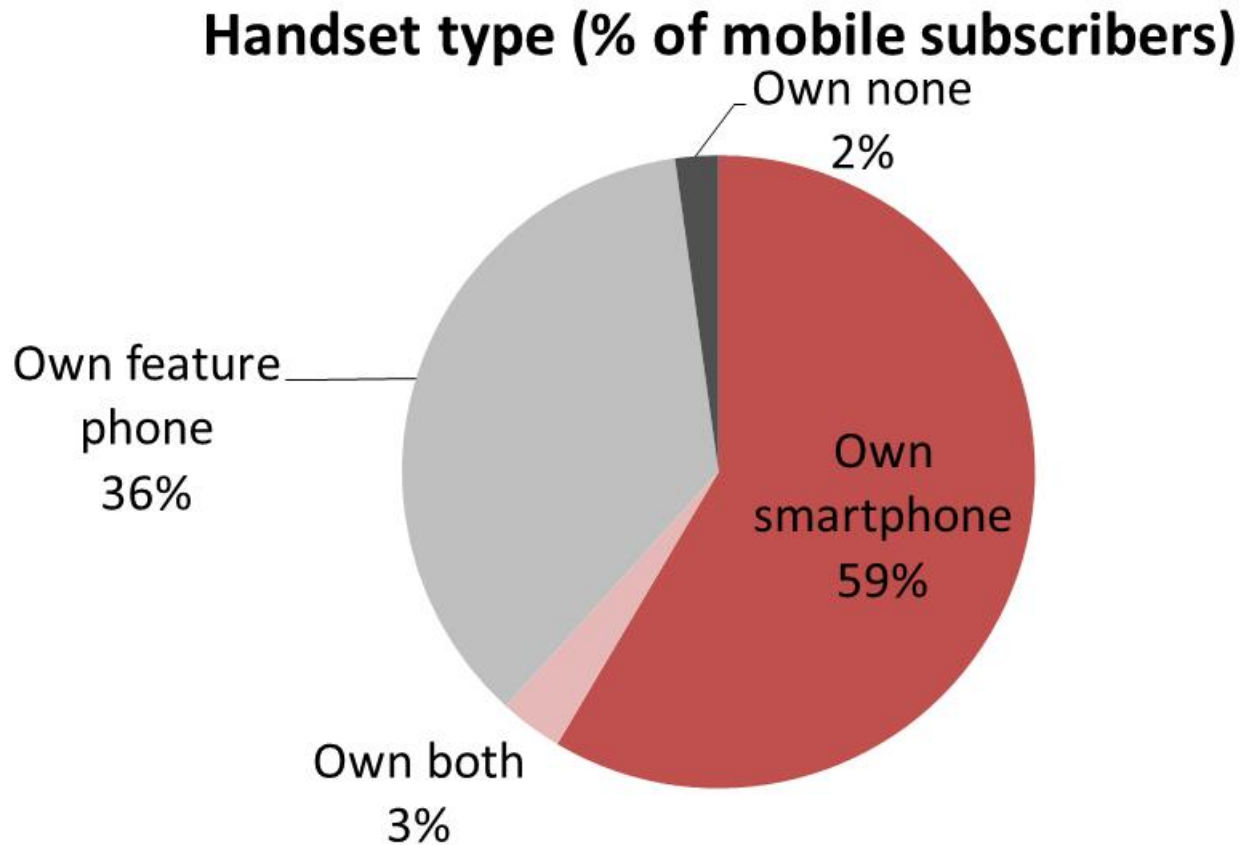
Mobile subscribers by Gender (% of 15-65 year olds)



Mobile subscribers by age (% of 15-65 yr olds)

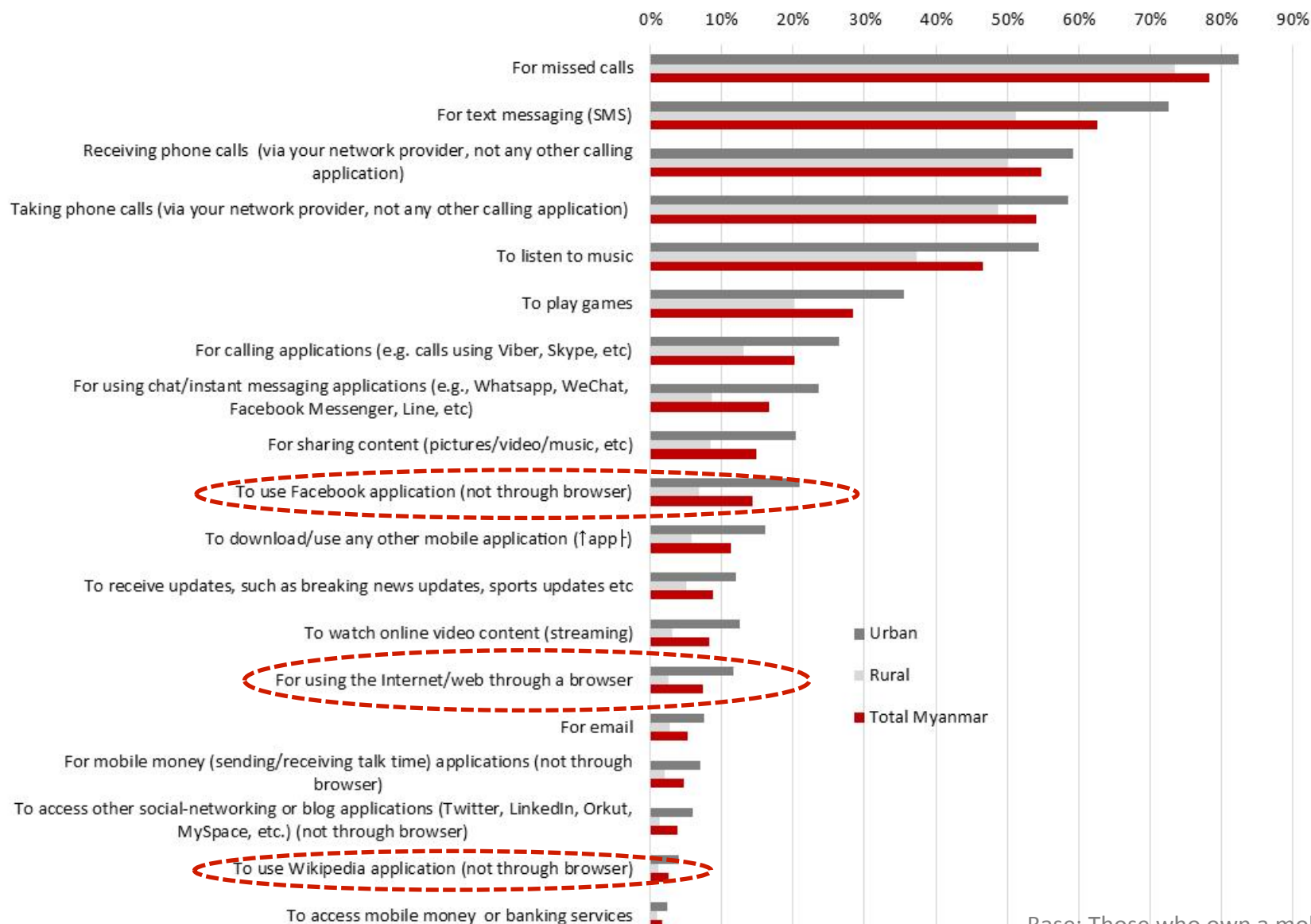


Smartphones dominate



Mobile for voice, SMS, missed calls, music, games

What they do with their mobile (% of mobile subscribers)



Computer and Internet (via browser) use very low

Have you used a computer from any location in the last 12 months? This can include a desktop, laptop or tablet (tab) computer

	% 15-65 year olds
Yes	2%
Can't remember when, but I have used one before	1%
No	90%
Don't know what a computer is	7%

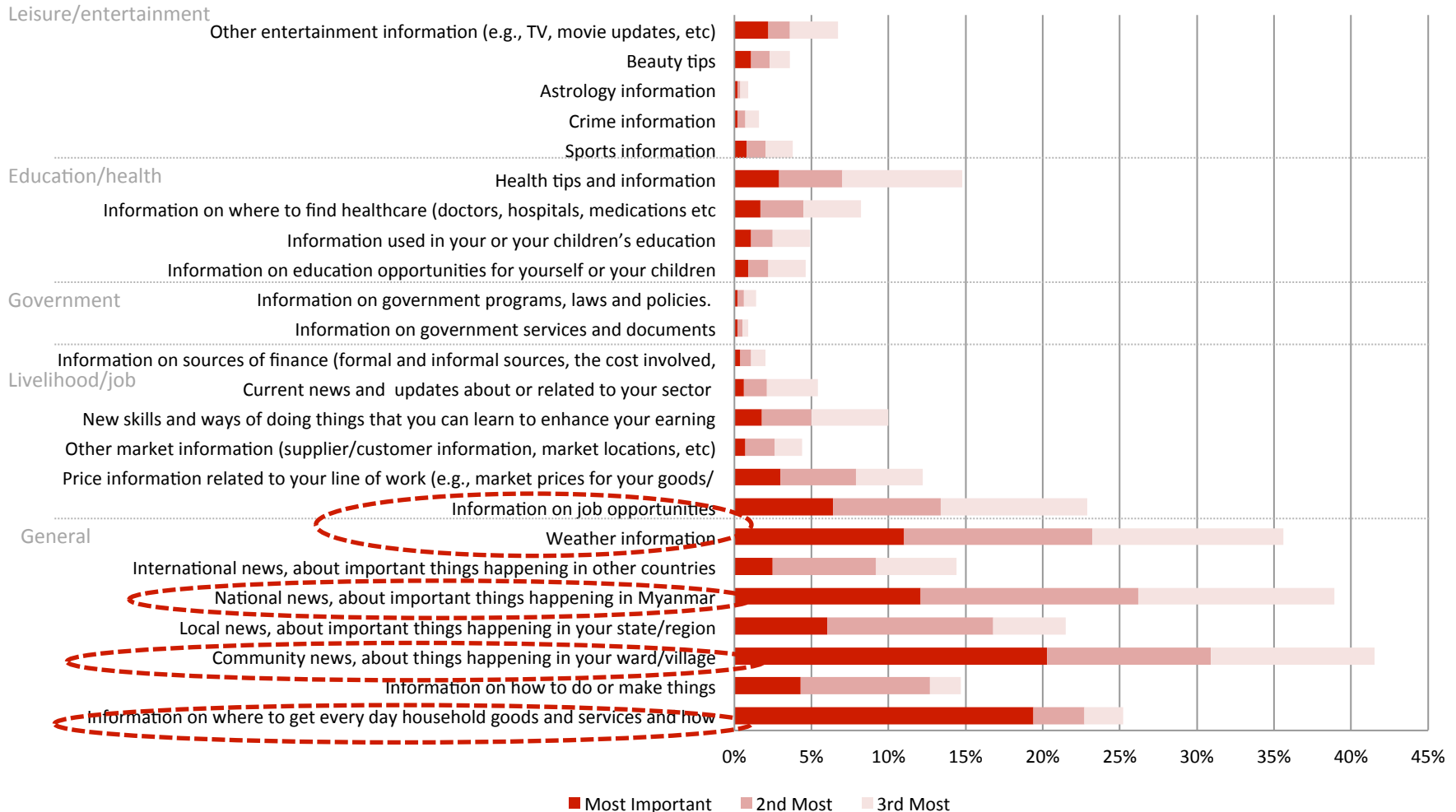
Have you used the Internet through a browser (e.g., UC Browser, Opera, , Chrome, Mozilla Firefox, Dolphin, Internet Explorer etc.) on a tab, computer or mobile phone in the last 12 months

	% 15-65 year olds
Yes	2%
Can't remember when, but I have used one before	0%
No	92%
I haven't heard of internet	6%

Small base (approx. 200), but all of these users are mobile subscribers; almost 75% of this use is via a mobile Internet browser; more than half use it at least once a day; most frequent use is for Facebook (75%).

Information needs: Thirst for news (national & community), where to obtain daily goods/ services, weather, jobs

Day-to-day information needs (% of rural 15-65 year olds)



Compared to non-subscribers, mobile subscribers are 'hungrier' for information – want more, faster than currently available

